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ABSTRACT

This document shares strategies and techniques that can facilitate transfer of learning among health care workers. The guide begins with a discussion of reasons why "good" training fails and lists possible interventions for addressing the following performance factors: job expectations; performance feedback; physical environment and tools; motivation; and skills and knowledge required for the job. The concept of transfer of learning is defined and illustrated by a case study examining improving transfer of learning related to infection control. A transfer-of-learning matrix lists specific actions supervisors, trainers, learners, and coworkers and others can take before, during, and after training interventions to ensure support for the transfer of knowledge and skills and thereby improve performance on the job. The matrix includes suggestions adapted from the research literature and from the experiences of supervisors, trainers, and learners in the health care field. The suggestions can be adapted to fit many situations, including those using different types of learning interventions and supervisory arrangements. Guidelines are presented for developing an action plan to document the steps that individual supervisors, trainers, learners, and coworkers can take to maximize the transfer of learning. (Contains 12 references.)(MN)

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Transfer of Learning

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A Guide for Strengthening the Performance of Health Care Workers

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Transfer of

Learning

A Guide for Strengthening
the Performance of Health Care Workers

PRIME II

JHPIEGO CORPORATION

Acknowledgments

Project Coordinators:
Lucy Harber, Instructional Design Specialist, Intrah/PRIME II

Rick Sullivan, Director of Learning and Performance Support, JHPIEGO

Core Development Team:
Ann Blouse, Director of Information Resources Office, JHPIEGO

Débora Bossemeyer, Clinical Training Advisor, JHPIEGO

Julia Brothers, Clinical Training Advisor, JHPIEGO

Lucy Harber, Instructional Design Specialist, Intrah/PRIME II

Nancy Kiplinger, Instructional Design Specialist, Intrah/PRIME II

Cathy Murphy, Acting Director, Training and Learning Unit, Intrah/PRIME II

Swaraj Rajbhandari, Clinical Training Advisor, JHPIEGO

Sharon Rudy, former Associate Project Director for Performance Systems, Intrah/PRIME II; currently Director, Population Leadership Program

Rick Sullivan, Director of Learning and Performance Support, JHPIEGO

Reviewers:
Mary L. Broad, Distinguished Author and Training Consultant—a special thanks for your support of this effort

Avinash Ansingkar, Regional Training Manager, Asia/Near East, Intrah/PRIME II

Maj-Britt Dohlie, Supervision Specialist, EngenderHealth/PRIME II

Susheela Engelbrecht, Midwifery Advisor, ACNM/PRIME II

Barbara Felling, Coordinator for Technical Initiatives, DELIVER/John Snow Inc.

Wallace Hannum, Associate Project Director, Performance Systems, Intrah/PRIME II; Associate Professor, School of Education, University of North Carolina at Chapel Hill

Wanda Jaskiewicz, Regional Program Officer, Latin America/Caribbean, Intrah/PRIME II

Marc Luoma, Director of Performance Improvement, TRG/PRIME II

Enriquito Lu, Reproductive Health Training and Medical Advisor, JHPIEGO/Indonesia

Jim McCaffery, Training Consultant, TRG/PRIME II

Constance Newman, Senior Evaluation Manager, Intrah/PRIME II

Robert Rice, Associate Director, Policy and Research Utilization, Family Health International

Gregory Roche, Performance Improvement Advisor, DELIVER/John Snow Inc.

Sylvia Vriesendorp, Organization Development Specialist, Management & Leadership Program, Management Sciences for Health

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Editors:
David Nelson, Senior Writer/Editor, Intrah/PRIME II

Wendy Dufour, Instructional Design Consultant, Intrah/PRIME II

Graphic Designer:
Molly Windsor, Graphic Designer, Intrah/PRIME II

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Introduction

The goal of a health care delivery site is to provide quality services to a community. The clinical knowledge and skills of a site's staff are a critical factor in establishing and sustaining quality services. However, there are many other factors in the work environment that can directly or indirectly affect the quality of services and influence the ability of providers to apply their knowledge and skills in the services they offer.

The primary purpose of this guide is to share strategies and techniques that can be used before, during, and after training interventions to ensure support for the transfer of knowledge and skills to improved performance on the job. The strategies and techniques for transferring learning are presented in an easy-to-use matrix that serves as a table of contents for the rest of the document. We have also included a brief introduction to the many performance factors that can play important roles in the transfer of learning. Users of this guide are encouraged to examine their work environments carefully in order to fully understand all the factors that may be affecting worker performance. A case story on page 7 illustrates several of the performance factors and demonstrates how to implement some of the ideas shared in the matrix.

The information in this guide enables all of the stakeholders involved in a training intervention to play their respective roles in ensuring that transfer of learning occurs. Stakeholders in the training and learning process may include policy makers and officials at national, regional and local levels, program planners, supervisors, trainers, learners and their co-workers. For learning interventions to be successful, stakeholders must work together as partners with a common goal. While this guide outlines specific actions for supervisors, trainers, learners and their co-workers, other stakeholders can also use this information to gain an appreciation of the process and an understanding of the support and resources needed to ensure transfer of learning.

Why does "good training" fail?

Many trainers and instructional designers have experienced the frustration of designing and delivering a stellar training intervention only to find out after training that the learners are not performing on the job as expected. Supervisors also experience frustration when staff members participate in training interventions but then do not use their new knowledge and skills to improve their work. Upon completion of the training intervention, the learners had demonstrated the skills competently and passed the knowledge test—so why are they now unable to perform those same skills at their work place? There are many possible reasons.

Historically, training interventions have rarely been successful in resolving job performance problems caused by factors other than lack of knowledge and skills. In some situations, learners acquire knowledge and skills during training only to find that they are not supported in using this new information in their work environment.

Before embarking on the design of a learning intervention and making an investment of resources in training, it's imperative to make certain that you are dealing with a performance issue that can be "fixed" by training. Once you've invested in training, you must then ensure that your learners are supported on the job by their organizations, their work environment, their supervisors and their co-workers.

Performance Improvement (PI) is a systematic approach to solving performance problems or creating effective new performance. PI offers a set of easy-to-use tools designed to achieve organizational goals. The PI approach identifies the root causes of performance problems and the interventions needed to close the gaps between actual and desired performance.

For information about Performance Improvement and the performance factors, consult www.pihealthcare.org, the website of the USAID Performance Improvement Consultative Group.

The Performance Factors	Possible Interventions
1. Job expectations *Do providers know what they are supposed to do?*	Provide adequate performance standards and detailed job descriptions Create the necessary channels to communicate job roles and responsibilities effectively
2. Performance feedback *Do providers know how well they are doing?*	Offer timely, constructive, and comprehensive information about how well performance is meeting expectations
3. Physical environment and tools *What is the work environment like, and what systems are in place to support it?*	Develop logistical and maintenance systems to provide a satisfactory physical environment and maintain adequate supplies and equipment Design work space to suit activities
4. Motivation *Do people have a reason to perform as they are asked to perform? Does anyone notice?*	Seek provider input to identify incentives for good performance Provide positive consequences for good performance and neutral or negative consequences for below standard performance Encourage co-workers to support new skills
5. Skills and knowledge required to do the job *Do providers know how to do the job?*	Ensure job candidates have prerequisite skills Provide access to trainers and information resources Offer appropriate learning opportunities

The literature on performance improvement describes several primary factors, often interrelated or complementary in their impact, that support good performance in the work place (see table above). When a performance problem is identified in terms of these factors, a solution or intervention usually becomes clear.

Health care providers can only perform as well as the systems that support them. Leaders and supervisors are responsible for building and sustaining organizational structures that enable providers to work at expected performance levels. The five performance factors are tools that can be used to analyze performance and provide exemplary support.

The final factor on the list, required knowledge and skills, is addressed primarily through training and learning interventions. Interventions directly targeting the other four factors are not described in detail in this guide. However, supervisors and other stakeholders often need to address these factors to help ensure that the knowledge and skills acquired by learners result in improved performance on the job. As you read the strategies proposed in the matrix for transferring learning, you'll see many references to these performance factors and the organizational structures that support performance.

Transfer of Learning

When the acquisition of knowledge and skills is identified as the solution to a performance problem or gap at a work site, training or other learning interventions will be used to improve the performance of health care workers. The key individuals involved in this process include:

Supervisors: responsible for monitoring and maintaining the quality of services and ensuring health care workers are properly supported in the work place. In this guide, "supervisor" refers to a learner's "in-charge" at the health care facility.

Trainers: responsible for helping health care workers acquire the necessary knowledge and skills to perform well on the job.

Health care workers: responsible for the delivery of quality services (e.g., clinicians, counselors, administrators, cleaners). In this guide, "learners" is used throughout to refer to health care workers participating in learning interventions.

Co-workers: responsible for supporting learners while they are engaged in training and as they apply new knowledge and skills at the work site.

As the case story on page 7 shows, supervisors, trainers, learners and co-workers all have responsibilities before, during and after a training intervention if practices at a facility are to improve. By working as partners, these individuals can help sustain the knowledge and skills gained during training. Many interventions can be used to enhance the performance of health care workers and the quality of clinical services (e.g., focusing on improved management practices and supervisory approaches, adequate equipment and supplies, clear job expectations, performance feedback). As described in the case story, many of the possible interventions overlap and require coordinated implementation.

Learning interventions are the most common means of helping health care workers obtain the necessary knowledge and skills to perform well on the job. The most common types include:

Classroom-based, group training courses.

Distance-learning programs in which interactions with the trainer and other learners are facilitated using technology, whether high-tech (e.g., computer applications used over the Internet, interactive videoconferences) or low-tech (e.g., print-based materials sent via the postal service).

Structured **on-the-job training** (OJT) courses that are facilitated by a trainer or supervisor at the job site (e.g., whole site training).

Independent self-study programs delivered using various media including print, audio/video tapes, CD-ROM, the Internet.

Programs that involve a **combination** of the above interventions.

These various learning interventions can be very effective in enabling health care workers to develop essential knowledge and skills. Nevertheless, they are only part of the transfer of learning process that helps to ensure that such interventions result in improved job performance.

What is transfer of learning?

Transfer of learning is defined as *ensuring the knowledge and skills acquired during a learning intervention are applied on the job.* The goal is for learners to transfer 100% of their new knowledge and skills to their jobs, resulting in a higher level of performance and an improvement in the quality of services at their facilities.

Do the issues described in the story below sound familiar? Consider what actions were taken in this case to improve the transfer of learning...

The Case of the Disappearing Infections

The local maternity clinic provides basic reproductive health services and is visited by many members of the community. Several health care providers have complained to the site supervisor that infections have increased among both staff and clients. In an effort to address the problems, the supervisor chooses a representative group of the health care workers at the site to form a team to conduct a performance needs assessment.

First, the team meets to discuss how to conduct an assessment that will identify the problems and enable them to agree on an outcome that will benefit the clinic.

Second, the team refers to national service delivery standards to identify the acceptable level of infections among staff and clients. A look at the records shows that, at present, infection levels are 40% higher than the acceptable level.

Next, the team searches out the root causes for this performance gap. They find several causes related to performance factors:

- ❑ No infection prevention (IP) standards are in place at the clinic—*providers do not know what is expected of them*
- ❑ Supervisors are not giving feedback regarding IP practices—*providers do not know how well they are doing*
- ❑ Necessary supplies, such as bleach, are lacking—*the necessary tools are not in place*
- ❑ IP practices are inadequate to protect clients and providers (e.g., hand washing is inconsistent and not done correctly; providers are not wearing gloves at the appropriate times)—*providers do not know how to do their job*
- ❑ Incorrect procedures are being used to process equipment—*providers do not know how to do their job.*

The team identifies and designs several interventions that address the root causes for high infection rates at the clinic: lack of supplies, lack of performance standards, and lack of feedback given to clinic workers regarding IP. To improve knowledge and skills, the team decides to offer learning opportunities for key service providers in IP practices and to post job aids for hand washing and equipment processing at appropriate locations.

The team is now ready to implement these interventions. The supervisor arranges for several health care providers who play key IP roles at the facility to attend an IP course that combines classroom work with self-directed learning activities that will be completed at the clinic. In preparation for the course, the trainer recommends that the supervisor:

- ❑ share the performance needs assessment findings so the trainer can adapt the course to the identified needs and conduct any additional assessment of needs required specifically for the training intervention
- ❑ coordinate the training intervention with interventions that target other performance factors
- ❑ work with the site team to select the providers who can benefit the most from training and to begin setting expectations for improved IP practices at the clinic
- ❑ meet with the learners to discuss the objectives of the training and the expected outcomes that will be developed into an action plan during the training session
- ❑ participate in the final session of the course to become aware of the knowledge and skills the providers will be expected to apply at the clinic
- ❑ meet with the learners when they return from the classroom portion of the training to talk about how best to implement what they have learned. The learners will share an action plan they have developed and refined during the course describing specific activities to improve IP practices at the clinic, including sharing their new knowledge with co-workers
- ❑ post job aids that list key IP steps on the wall near the instrument processing area and sink.

The action plan also includes a schedule for completing self-directed learning activities. With assistance from the supervisor, the providers set aside a time and place to complete these exercises. They also inform the supervisor that in the next few weeks the trainer will be visiting the site to help them address any challenges they have encountered while implementing the steps in their action plan.

The supervisor and providers continue to monitor the quality of services and within several months the number of infections has not only decreased but is the lowest it has been in years. These improvements translate into better health outcomes for clients and a safer environment for health care workers.

What is the transfer of learning process?

The transfer of learning process is an interrelated series of tasks performed by supervisors, trainers, learners, co-workers, and sometimes others (e.g., government regulators, clients, etc.) before, during and after a learning intervention in order to maximize transfer of knowledge and skills and improve job performance. The process is usually represented in a matrix that outlines the specific tasks performed by supervisors, trainers, learners and co-workers.

Why focus on transfer of learning?

Transfer of learning is important for supervisors, trainers, learners and co-workers because:

- ❑ Transfer of learning is in the best interest of clients. Health care workers participate in a learning event to acquire new knowledge and skills to better meet the needs of their clients. Improving the transfer of learning enhances the quality of services— and may lead to increased client satisfaction.
- ❑ Learning interventions can be expensive— improving the transfer of learning helps to protect these investments.
- ❑ Learners are motivated to perform well at their jobs when they are able to apply what they have learned. The support and guidance of supervisors, trainers and co-workers can encourage and empower learners to make changes and improve performance.
- ❑ Supervisors and learners are more accountable for implementing what is learned if there is early agreement about what will occur after training (often as outlined in an action plan).
- ❑ Trainers are more likely to prepare interventions that meet the specific needs of learners and health care delivery sites when they have become invested in the outcome of training.
- ❑ While supervisors may not be proficient in all of the clinical services provided by the health workers they supervise, being involved in the transfer of learning process can help them stay up-to-date.

What is the transfer of learning matrix?

A matrix provides a useful means of presenting the transfer of learning process. The matrix includes suggestions adapted from the research literature and the experiences of supervisors, trainers and learners in the health care field. The suggestions can be adapted to fit many situations, including the use of different types of learning interventions (e.g., classroom, on-the-job, self-directed) and various sorts of supervisory arrangements (e.g., internal on-site, periodic external visits). It may not be possible to implement all of these suggestions as part of any one learning intervention. Some of the suggestions in the matrix may represent a radical change from current policies and procedures at your facility. However, if you can adapt and implement just a few of the ideas described in the matrix, you will improve the likelihood that new knowledge and skills will be applied on the job. The more ideas and suggestions you can implement, the stronger the transfer of learning operation will be. In the process you will also help to lay the groundwork for changing— and improving—the design of future learning interventions.

The Transfer of Learning Matrix

	Before Learning	During Learning	After Learning
Supervisors	• Understand the performance need • Participate in any additional assessments required for training • Influence selection of learners • Communicate with trainers about the learning intervention • Help learners create a preliminary action plan • Support and encourage learners	• Participate in or observe training • Protect learners from interruptions • Plan post-training debriefing • Provide supplies and space and schedule opportunities for learners to practice	• Monitor progress of action plans with learners and revise as needed • Conduct post-training debriefing with learners and co-workers • Be a coach and role model—provide encouragement and feedback • Evaluate learners' performance • Stay in contact with trainers
Trainers	• Validate and supplement the results of the performance needs assessment • Use instructional design and learning principles to develop or adapt the course • Send the course syllabus, objectives and pre-course learning activities in advance	• Provide work-related exercises and appropriate job aids • Give immediate and clear feedback • Help learners develop realistic action plans • Conduct training evaluations	• Conduct follow-up activities in a timely manner • Help strengthen supervisors' skills • Facilitate review of action plans with supervisors and learners • Share observations with supervisors and learners • Maintain communication with supervisors and learners
Learners	• Participate in needs assessments and planning • Review course objectives and expectations and prepare preliminary action plans • Begin establishing a support network • Complete pre-course learning activities	• Participate actively in the course • Develop realistic action plans for transferring learning	• Meet with supervisor to review action plan • Apply new skills and implement action plan • Use job aids • Network with other learners and trainers for support • Monitor your own performance
Co-workers and others	• Participate in needs assessments and discussions of the training's intended impact • Ask learners to bring back key learning points to share with the work group	• Complete learners' reassigned work duties • Participate in learning exercises at the request of learners	• Be supportive of learners' accomplishments

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In addition to the specific suggestions included in the matrix, the following actions are essential to the transfer of learning process:

- ❑ Exploring and understanding the relationship of knowledge and skills to the other factors (page 5) that affect performance at the work site
- ❑ Establishing and maintaining structures that support desired performance (e.g., using non-training interventions to influence other factors that affect performance, such as constructive feedback, provision of necessary equipment and supplies, clear protocols, etc.)
- ❑ Working collaboratively with all individuals who can support (or might hinder) desired on-the-job performance
- ❑ Using action plans or similar devices to set and maintain clear performance objectives and expectations and to document progress and challenges
- ❑ Creating a supportive environment in which all workers appreciate their potential to improve services by acquiring new skills and knowledge.

The matrix serves as the organizing mechanism for the content in this guide. The entries on the grid summarize specific actions that supervisors, trainers, learners and their co-workers can take to improve the transfer of learning. Following this section are more detailed descriptions of these actions. The descriptions correspond with the cells in the matrix so that you can easily access more information about the areas that you find most interesting. In the process of using the guide, you may identify additional actions to support full application of new learning in your situation. Be open to these possibilities in addition to those included in this document.

What is an action plan?

An action plan is a written document that describes the steps that supervisors, trainers, learners and co-workers will complete to help maximize the transfer of learning.

An action plan is initiated prior to the training intervention so that everyone who can support the transfer of learning is involved from the beginning. The plan is refined during the training event and usually is not completed until after the event when learners are implementing new skills on the job. As you will see, action plans are a recurring topic throughout this guide. The content and layout of an action plan should support the users of the plan, especially the learners. In developing an action plan, keep in mind these important points:

- ❑ Write activities as discrete steps that are realistic, measurable and attainable.
- ❑ Identify clear responsibilities for learners, supervisors, co-workers and trainers.
- ❑ Develop a specific time schedule for completing activities.
- ❑ Identify resources necessary to complete the activities, including plans for acquiring those resources.
- ❑ Instruct learners to use a learning journal to help facilitate the development of an action plan. A learning journal is a notebook in which learners document issues, problems, additional needs for skills development, and questions that arise as new knowledge and skills are applied on the job.

See page 11 for a sample of a completed action plan that includes several features to consider as you design a format of your own. A blank action plan format can be found on page 33. Copy this for your use or develop your own format. The example used on page 11 is very detailed. This level of detail may not always be necessary, depending on the performance problem and the learning intervention being undertaken.

ACTION PLAN

Learner: Mary Danso **Training Intervention:** Family Planning/Counseling Update **Date:** April 2001

My Support Team/Network **Supervisor:** Mrs. Nyako **Trainer:** Miss Zakari

Co-worker(s): Fatou Abudu (attended training with Mary), Doris Isa , Mercy Nunoo, Awa Koufi

Specific Areas to Improve: (Think about distinct accomplishments and activities to be achieved.)
I want to improve my ability to provide appropriate counseling about FP methods

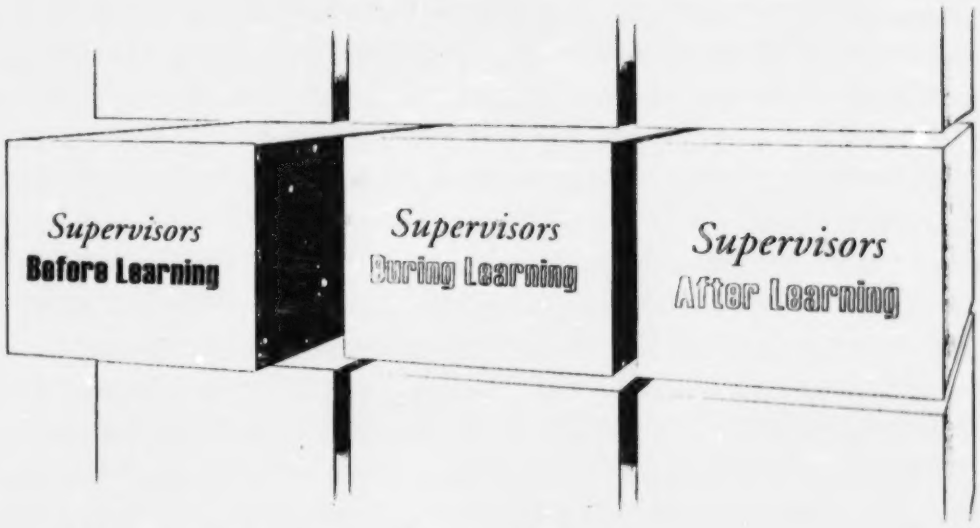
Problems to Overcome: (Describe the barriers that must be eliminated or reduced and how this will be done.)
Don't have a setting for confidential conversations - identify and discuss possible options with clinic supervisor

Detailed Specific Actions in Sequence (Include regular progress reviews with the support team as a part of the specific actions)	Responsible person(s)	Resources	Date/ Time*	Changes To Look For
Step 1. Participate in post-training meeting to review, revise and endorse my action plan (and Fatou's); compare with/update procedures manual as needed (follow-up to pre-training meeting)	Entire support team	action plans; procedures manual	May 1 2pm	plans and manual complementary; team's roles/ actions clarified
Step 2. Rearrange furniture in the clinic supervisor's office to create small private area for counseling	Mary, Fatou	chairs & table	May 2 2pm	staff using space appropriately
Step 3. Assemble box of FP method samples to use during counseling sessions (store on shelf in counseling area for all providers to use)	Doris, Mercy	box & supplies from stock	May 2 2pm	samples always ready to use
Step 4. Create poster that encourages clients to ask their provider about FP; hang in waiting area	Mary, Fatou	poster board & markers	May 3 2pm	clients reading poster and asking questions
Step 5. Review counseling job aid and notes from training activity; place job aid on table in counseling area	Mary	job aid from training	May 3 2pm	feel ready for practice session
Step 6. Conduct a practice counseling session with co-worker in counseling area, using FP samples and job aid	Mary, Awa	counseling area; samples; job aid	May 4 2pm	build confidence; ensure suitability of space design
Step 7. Observe and provide feedback during practice counseling session (Fatou to practice as well)	Fatou, Mrs. Nyako	counseling skills checklist	May 4 2pm	useful feedback (peer/supervisor)
Step 8. Participate in action plan review session; revise and/or update plan depending on progress to date	Entire team	action plan	May 7 2pm	team agrees that I'm ready to counsel clients
Step 9. Orient clients and counsel those interested in FP; document issues/questions in learning journal	Mary	learning journal	May 11 ongoing*	increase in clients choosing an FP method
Step 10. Discuss journal entries with co-workers (and with supervisor as needed)	all peers	learning journal	ongoing*	insights regarding improvements
Step 11. Observe counseling session and provide feedback (Fatou to be rated as well)	Mary, Mrs. Nyako	skills checklist	ongoing*	ensure proficiency matches standard

Commitment of Support Team/Network:
I support the action plan described above and will complete the actions assigned to me. If I am unable to complete an activity, I will help make arrangements to modify the plan accordingly.

Signature of learner: Mary Danso **Date:** May 3, 2001
Signature of supervisor: Nana Nyako **Signature of trainer:** Aby Zakari
Signatures of co-workers: Fatou Abudu, Doris Isa , Mercy Nunoo, Awa Koufi

* establish set day and time for ongoing activities



Supervisors – Before Learning

Understand the performance need
Conducting a performance needs assessment is an important step in enabling supervisors to fully understand the nature of the performance needs at their facilities. Supervisors should ask themselves: "What is the desired performance? Is there a gap between what the staff is actually doing and what they should be doing? Do I understand the root causes of this gap? Is training the right solution to improve job performance?" Although training is a popular intervention for improving job performance, other interventions might be more appropriate. Before you embark on a training intervention, be sure that training is the right solution for the problem.

Participate in any additional assessments required for training
An additional needs assessment may be conducted by trainers to ensure that the goals and objectives of a learning intervention will meet the identified performance needs of the learners. In order to design and develop the most effective intervention, trainers often require additional information that would not be gathered during a performance needs assessment (e.g., specific learner characteristics such as the reading level of learners or current skill level of each learner on a specific task).

As a supervisor, you have unique knowledge of staff members' on-the-job performance and can describe the specific gaps in knowledge and skills that a training intervention needs to address.

- ❑ Communicate with trainers about the results of the performance needs assessment and the problems that can be addressed by training.
- ❑ Discuss specific measures of success for the learning intervention. How will the success of the transfer of learning process be evaluated?
- ❑ Involve learners and their co-workers in the process. Explain to them the importance of cooperating with the trainer during assessment activities such as being observed and answering questionnaires.
- ❑ Provide trainers access to your site and to your staff.

By actively participating in additional assessments, you will help guarantee that the resulting training will have the desired effects.

Influence selection of learners
Selecting the appropriate staff members for training is an important part of ensuring the effectiveness of a training intervention. Participate in staff selection as much as possible and involve staff by discussing who should attend and why. As you think about whom to send for training, consider the following:

- ❑ Who will benefit most from the training?
- ❑ Which individuals are most motivated to learn?

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- ❑ Which individuals have the prerequisite skills required for the course?
- ❑ Who is in the best position to share the training information with others?
- ❑ Who will be implementing the newly acquired knowledge and skills?
- ❑ Which management and support staff will also be involved in the implementation of newly acquired knowledge and skills? Include these staff in the selection process if you feel that support will be needed in order to introduce new services.
- ❑ Which two or more individuals would make a good team to introduce a new service? Sending staff from different cadres may be helpful. For example, sending a physician and a nurse to a minilaparotomy training will provide the site with a team that can work effectively together.

Communicate with trainers about the learning intervention

Supervisors who are aware of the content of the training can model desired behaviors, better explain post-training expectations to staff, and reinforce desired behaviors after training. Awareness of the content of training can come from reviewing the course materials, receiving an orientation from the trainer, and observing or participating in parts of the learning intervention. Such interaction between supervisors and trainers allows learners to see that their supervisors are committed to the learning intervention and interested in the entire process. Communicating with the trainers also provides an opportunity for supervisors to make sure that the trainers understand the performance need. Working with the trainers, you can determine what will maximize the event for the learners.

Help learners create a preliminary action plan

Communicate positive messages to learners about the importance of training. Identify and share with them specific expectations about performance. Before the training activity, ask the learners what they hope to get out of the training. Then explain precisely what you anticipate they will be able to do for your facility with their new knowledge and skills.

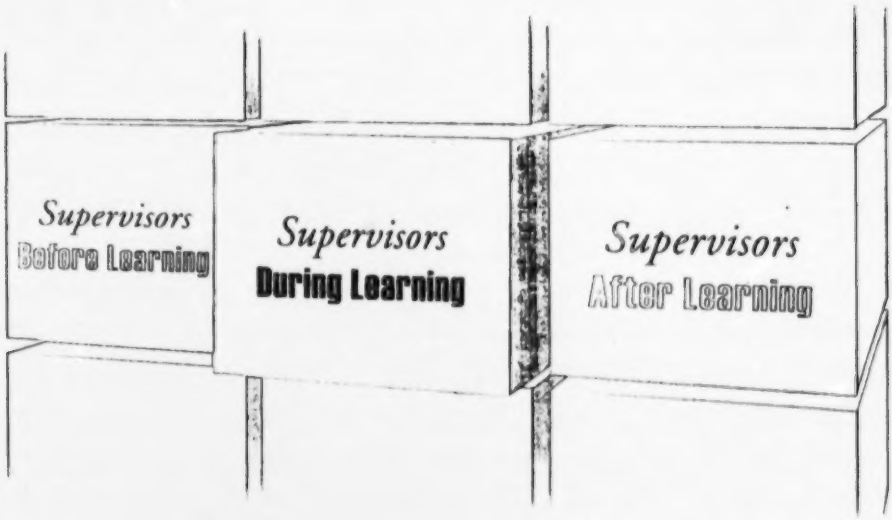
Supervisors can help learners understand how their new knowledge and skills contribute to the goal of improving health care by working with the learners to develop action plans. Supervisors and learners can begin preliminary work on an action plan at their job sites prior to the training event. Discussing the action plan gives both supervisors and learners a chance to clarify expectations related to the training. Generally, learners will further refine their action plans with the help of a trainer. Supervisors can then complete the action plans with the learners after the training event. An example of a completed action plan is found on page 11. See page 33 for a blank plan.

Support and encourage learners

Once supervisors decide who will attend the training, it is important to provide those learners with the support they need.

- ❑ ***Assist learners with arrangements for the course.*** Make sure all arrangements are made in a timely manner. Support learners in this process by assigning staff to assist them. If they rely on financial support from your facility for travel, lodging or course fees and materials, provide funding promptly. If training occurs regularly, create systems to arrange travel, reimburse expenses and document the training courses learners have completed.
- ❑ ***Reassign each learner's workload during the training.*** Make sure your site functions smoothly during a learner's absence by delegating his or her workload to co-workers. Take care, however, not to make co-workers resentful by overwhelming them with additional tasks. Make plans to lighten the learner's workload for a period after training to ensure that he or she will have the time and energy to share new knowledge and skills with others and to implement changes.
- ❑ ***Reassure learners of your support.*** Assure learners that you will give them time to become proficient in their new skills. Encourage learners to include post-training debriefings with co-workers on their action plans so they can share what they learn. Offer to help by organizing staff meetings and assisting with the distribution of training information and job aids. Encourage co-workers to be supportive of learners.

(Note: Unless learners have been trained to train others, they should not be expected to train their co-workers in the skills they will learn, especially complex clinical procedures.)



Supervisors – During Learning

Participate in or observe training
Discuss with trainers what sessions would be most helpful or appropriate for you to attend (e.g., sessions that include problem-solving discussions concerning implementation of new knowledge and skills at the work site). When practical, attending the training demonstrates your support of the trainers as well as the learners. Training interventions that use on-the-job and self-directed learning components include activities that occur at the job site and therefore provide excellent opportunities for you to be involved in the learning and transfer of skills.

Protect learners from interruptions
Supervisors have an important role in guarding the learners' time by not allowing others to interrupt or take learners away from training activities. Be prepared to limit your demands on learners during the training period. Missed sessions create learning gaps that decrease the training's positive impact and affect performance. By your actions, you can communicate that training is a priority and that mastering the new knowledge and skills is essential.

Plan post-training debriefing
Set aside some of your time to meet with learners soon after the training to discuss the implications of what they have learned. Allow a few days for the learners to prepare their notes and organize their thoughts prior to this meeting. Also schedule some time for the learners' co-workers to meet with the learners to share ideas and discuss implementation.

Provide supplies and space and schedule opportunities for learners to practice
If learners will be introducing a new procedure or service at the work site, you may need to procure additional supplies and possibly some new instruments or equipment. Some procedures and services may require a dedicated space and equipment within the facility. You should arrange for supplies and regular maintenance of equipment, schedule time for learners to practice with the instruments and equipment, and help ensure that learners have opportunities to master the new procedures.

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Feedback Misinterpreted?
Feedback that is given (or understood) inappropriately can backfire and result in decreases in desired performance and reductions in worker motivation. Be sure to explain why and how you are giving feedback and the benefits to be gained.

Here is a personal example from an experienced trainer of trainers. "I was observing a new trainer doing a session from the back of the training room. I was taking care to make notes about specific examples of things she did well, could improve and should stop doing. The trainee was furious because each time I wrote something down she assumed it was a mistake she made. The irony was that most of my writing referred to things she did well, but by then she was so angry at me that there was no more communication possible. It took a while to heal the relationship."

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Good Intentions Gone Bad?
Learning interventions that are conducted to fill training quotas or to serve as perks or incentives for workers rather than to meet a specific performance need are generally unsuccessful. If you find yourself in a situation where training is occurring but doesn't appear to be the best intervention or where you were not involved in selecting those to attend training, make the most of it and explore ways to use the training opportunity to improve services. Be creative about how to take advantage of the present situation. Suggest to administrators and policy makers that those who best understand the needs should make decisions regarding who attends future training events.

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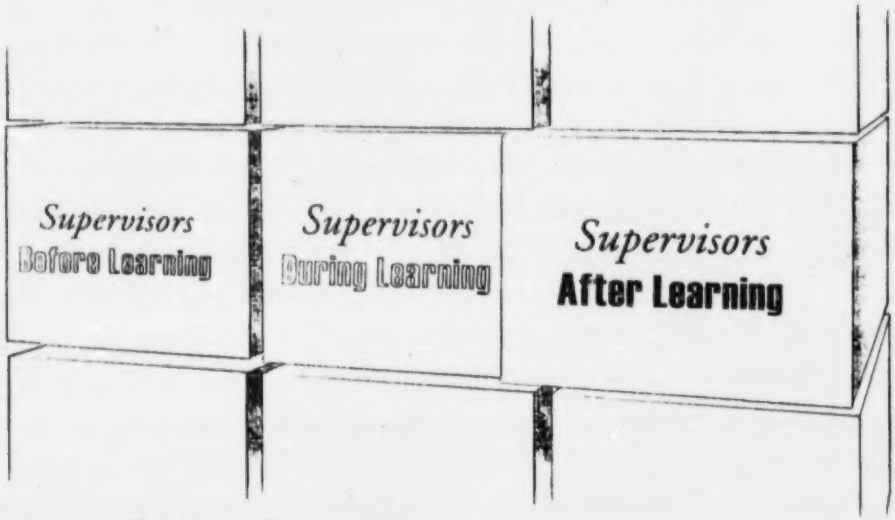
Did you know...?
In the 1980s, several researchers surveyed top executives and trainers about barriers to transfer of learning. Lack of reinforcement on the job and lack of involvement by upper level management (i.e., supervisors) was the number one reason given by both groups. Your support and involvement is probably the most effective way to make the transfer of learning successful. (Kotter JP, 1988; Newstrom JW, 1983)



Supervisors – After Learning

Monitor progress of action plans with learners and revise as needed

Supervisors, trainers and learners have invested time and energy in creating action plans. Now is the time for those efforts to pay off. Meet with the learners to review together the current action plan and make sure that you are in agreement regarding expectations and how and when they will be met. Supervisors and learners can use action plans as a monitoring tool to gauge progress, identify problems, and work on solutions. Routine supervisory meetings are a great time to provide constructive feedback and check learners' progress toward mastering and using their new skills, as well as to ask what more you can do as their supervisor to support the transfer of learning. When necessary, action plans should be revised to correspond with changing needs at the work site. Using action plans can also help to identify feedback for trainers or facility administrators about problems and solutions that only they can address.

Conduct post-training debriefing with learners and co-workers

Supervisors and learners should involve other staff at the work site in the transfer of learning process by briefing them shortly after the training. This is a good time for you to identify your expectations regarding implementation of action plans and for learners to share what they have learned with their co-workers. Supervisors and learners should set clear objectives for debriefing meetings to make sure that the discussion stays focused. Consider using these meetings for the following purposes:

- **Sharing** with co-workers the key concepts learned during the training
- **Providing** an opportunity for co-workers to ask the learners questions about the training
- **Reviewing** the needs assessment findings and discussing how newly acquired knowledge and skills can address current needs at the work site and be of value to everyone
- **Brainstorming** on how to integrate newly acquired knowledge and skills into present services
- **Reviewing** key activities from the learners' action plans and assigning resources to facilitate implementation.

Conducting a post-training debriefing provides an excellent opportunity to update all staff and discuss how the transfer of learning will improve service delivery at the work site. It is critical that your staff understands the reasons for any new interventions, services, or changes in procedures and knows how to implement them. This is an appropriate time for you to voice your support for the change process and the newly acquired knowledge and skills.

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Be a coach and role model—provide encouragement and feedback

Encourage and, when possible, coach learners as they incorporate new knowledge and skills into their work. A coach must be able to demonstrate the skill, observe and give feedback, and evaluate learner performance against a standard. If you cannot coach the learners, identify someone with appropriate expertise to provide coaching. Even though you may not be able to coach learners in a particular skill, you can still provide encouragement to help them build their self-confidence and realize their full potential as they master new skills. Encouragement and coaching are very important to the transfer of learning. Below are some specific approaches to consider:

- ❑ ***Give frequent reinforcement and immediate constructive feedback to learners as they try out new skills.*** Voice your support as you observe learners properly implementing newly acquired knowledge and skills by giving immediate positive feedback: "Nice job Anjou, I'm glad to see you preparing those instruments for processing according to the infection prevention practices that you learned."
- ❑ ***Use mistakes as learning opportunities.*** When learners make errors while practicing a skill, call the mistakes to their attention in a tactful and culturally appropriate manner. Your comments should describe the specific behavior that you observed; include steps that the learner performed correctly and those that need improvement. In most cases, unless a client is in danger, it is best to give feedback to learners after rather than during client-provider interaction.
- ❑ ***Coach learners as they try new skills.*** When learners begin practicing skills that are difficult or involve many steps, their skill levels will likely vary—some learners may still be novices while others may be closer to mastery. Offer to assist individual learners in a manner that is appropriate to the degree of progress they have made toward mastering the particular skill. When providing guidance, remember to always point out something that the learner is doing well before you offer suggestions for improvements or ask what the learner perceives he or she is doing well. Very often learners can make appropriate suggestions for self-improvement when given the opportunity to reflect on their performance.
- ❑ ***Model new skills or behaviors in your work.*** To show that you support the changes that learners are implementing, adopt new behaviors along with the learners and their co-workers. Don't expect your staff to make changes if you don't model changes as well.

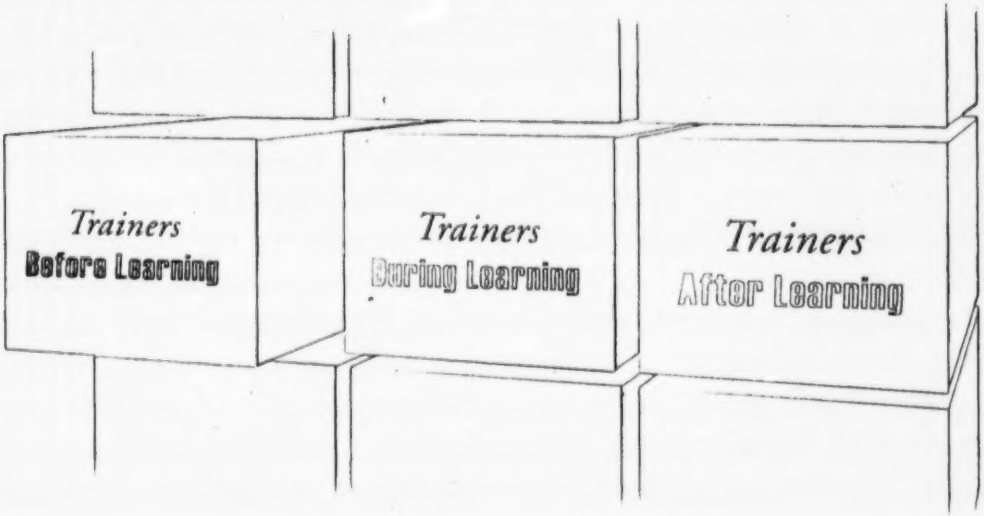
Evaluate learners' performance

Supervisors can have a significant impact on the transfer of learning by evaluating performance and providing feedback. Discuss with learners the reasons why evaluation is important, emphasizing that the goal is to provide them with feedback so they know how they are doing. Assure learners that you will provide ongoing guidance as well as formal periodic evaluations. It may be appropriate to include these periodic evaluations on the learners' action plan. If you cannot evaluate the learners' performance because you lack the technical expertise, identify someone who can.

When you evaluate learners, review with them the standard for the desired performance that is included in their job description or outlined in procedural guidelines or a skill checklist from the training course. Discuss how the standard compares to their present performance—are they failing to meet the standard, meeting the standard, or exceeding the standard? Involving learners in a self-assessment is one way to stimulate this discussion. Remember that evaluations should always include feedback on what learners are doing right.

Stay in contact with trainers

Maintain contact with trainers so that you can provide feedback about which aspects of the training were most effective. This allows you to receive information from trainers about how best to facilitate transfer of specific knowledge and skills. The interactions with trainers also serve as your direct contact with the training system, thus providing you with an opportunity to share your ideas regarding other training needs.



Trainers – Before Learning

Validate and supplement the results of the performance needs assessment

Communicate with supervisors and, if possible, learners about the identified performance gaps and the desired goals and outcomes of training. Supervisors of learners attending your courses are some of your most important customers. To help ensure that your course will meet the needs identified by supervisors and learners you will want answers to the following questions:

- ❑ What is the performance gap that training is expected to correct?
- ❑ Are there other performance gaps that need to be addressed by non-training interventions?
- ❑ Why do supervisors and learners believe that training will improve job performance?
- ❑ What will the learners need to be able to do after the course to improve performance?
- ❑ Do the learners selected to attend the course have the necessary prerequisite skills?
- ❑ Have the supervisors and learners developed preliminary action plans? If the skill set is new to both supervisors and learners the preliminary action plan may be very general.
- ❑ Are there resources to support the learners during and after training?

With the answers to these questions in mind, share with supervisors and, if possible, learners the goals and expected outcomes of your course. You can hold brief orientation sessions with groups of supervisors to share highlights of the training content. This can also be an opportunity to pretest key aspects of the course as the supervisors update their own knowledge and skills in the content area. Feedback from supervisors can be used to link the course outcomes to the learners' specific performance needs. Supervisors and learners need to understand how attending your course can improve performance at their facilities. In the event your course does not meet the needs of the learners, you may have to modify the course objectives and content or help supervisors and learners select a different course that will better meet their needs.

Encourage supervisors and learners to develop preliminary action plans that describe how learners will apply their new knowledge and skills after training. You will also play an important role in action planning during training as you help learners consider the best ways to apply their knowledge and skills.

Use instructional design and learning principles to develop or adapt the course

Whether you are adapting an existing course or developing a new one, a systematic process will help you prepare a course that will give learners the knowledge and skills they need to perform well in their work. Instructional design is a process that uses learning theory and principles to help you develop targeted learning experiences. Here is a summary of the process:

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Goals and Objectives Should Be SMART

Specific Measurable Attainable Relevant Time-bound

Goal: On completion of the self-directed learning program, the nurse-midwife will counsel clients and couples to make reproductive health decisions.

Objectives: After completing module 1, the midwife will be able to describe to a co-worker the benefits of counseling for RH clients.

After meeting with her learning partners for skills practice sessions, the midwife will be able to demonstrate the counseling process and associated interpersonal communication skills.

During the on-the-job, two-week practice period, the midwife will counsel at least five couples to help them make RH decisions. The midwife will perform all the critical skills on the checklist and score a minimum of 85% overall.

Need help writing good goals and objectives? See Robert F. Mager's classic, "Preparing Instructional Objectives." The latest edition was published in 1997.

- ❑ Start by reviewing the performance needs assessment to find out more about the requirements of the organization in which the learners work. When feasible, conduct additional assessments. Visit the work site and talk with the supervisor and several of the learners to develop a better understanding of what they do and why they need the course you plan to offer. Find out as much as you can about the characteristics of the learners so you can target content and materials appropriately.
- ❑ Use what you have discovered about the learning needs to develop goals for your course. A goal can be broad and general, but it should define the direction of the course.
- ❑ From the goals, generate course objectives that clearly describe the desired performance in terms of behavior. Well-written objectives should be specific and measurable. Often they include the criteria, or standards, for measuring performance after learning.
- ❑ Establish prerequisites so that the learners who attend your course are ready to absorb new knowledge and develop new skills. Because new knowledge and skills build on existing knowledge and skills, making sure learners have the necessary qualifications will help them make a smooth transition to the new material.
- ❑ Develop or adapt the content of your course based on the defined objectives and the characteristics of the learners (e.g., primary language, reading level). Select instructional approaches, techniques, and media based on the learning need. Design materials and activities to maintain learner interest and attention. Build in opportunities to practice new skills and provide feedback on performance until learners develop proficiency.
- ❑ Design and administer a pretest to assess the existing knowledge and skills of learners. Plan to give learners a posttest at the end of the course to assess what they have learned.

Send the course syllabus, objectives and pre-course learning activities in advance

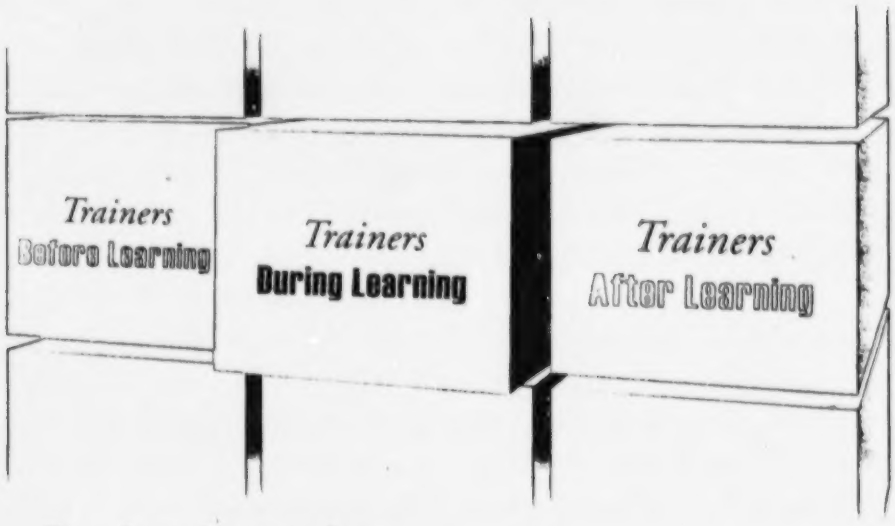
A syllabus should be part of the materials for each training course. Typically a course syllabus will contain the following information:

- ❑ name of the course
- ❑ course goals
- ❑ course objectives
- ❑ length of the course
- ❑ target audience
- ❑ course prerequisites
- ❑ course components (e.g., classroom instruction, clinical practice)
- ❑ evaluation methods.

Sending a copy of the syllabus to the supervisors and learners in advance will help to:

- ❑ ensure the course goals and objectives meet the needs of the learners
- ❑ guide supervisors and learners as they develop preliminary action plans
- ❑ ensure that learners are aware of what they will be learning and allow them to begin focusing on the upcoming course content.

Any pre-course activities (e.g., reading assignments, refresher modules, learner questionnaires, identification of work site problems and issues) should also be sent in advance. This contact provides a good opportunity to encourage learners and supervisors to begin a preliminary action plan. You may also want them to identify specific problems from their facilities that can be used in case study activities during the course.



Trainers — During Learning

Provide work-related exercises and appropriate job aids

Throughout your course, you should make every effort to help learners draw upon what they already know and connect what they are learning to what they need to do on the job. The design of your course should include activities and exercises to promote the transfer of learning. Here are some ways to facilitate this process during your course:

- ❑ Design activities that engage learners as participants and tap their existing knowledge and skills.
- ❑ Include realistic exercises that address the challenges being faced by the learners at their work sites. Consider brainstorming with the participants early in the course to focus on problems at their facilities and then use those problems as the basis for activities throughout the course.
- ❑ Schedule learning topics in short segments integrated with practice exercises and activities.
- ❑ Provide frequent opportunities for learners to reflect on what they are learning and plan how they will use their new knowledge and skills on the job. Give them a notebook to use as a learning journal. Periodically ask the learners specific questions to answer in their journals about how they will apply their new knowledge and skills, what challenges they may face and how they will overcome those challenges. Suggest that learners keep track of problems and questions they need to resolve and resources they will need to put new skills into practice. Remind learners to refer to their written reflections as they refine their action plans.
- ❑ Provide opportunities for learners to support each other by giving each other feedback and discussing how they will use their new knowledge and skills.
- ❑ Help learners identify or develop job aids they can use to promote the transfer of learning (e.g., a poster describing correct hand washing technique to hang on the wall near the sink). Have learners practice using job aids in situations similar to those on the job.

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Give immediate and clear feedback

Most workers have a strong need and desire to know how they are doing on the job. Supervisors and trainers are encouraged to provide immediate, individualized, and clear feedback in order to reinforce learners' desired behaviors.

There are numerous opportunities during a course for you to provide feedback to learners:

- ❑ during presentations and small-group activities when all learners can benefit from the shared feedback
- ❑ individually during skill practice sessions or while marking knowledge tests
- ❑ during breaks when you can approach learners or encourage them to approach you
- ❑ during clinical training when learners are working with clients (though this may be a more challenging opportunity).

Use a variety of techniques to help ensure that feedback is timely and meaningful, including:

- ❑ verbal feedback, such as positive behavior reinforcement or constructive correction
- ❑ nonverbal feedback, such as smiling and nodding during presentations.

Help learners develop realistic action plans

Supervisors and learners are encouraged to capture training expectations by developing preliminary action plans prior to beginning a course. With guidance from trainers, learners develop a more complete action plan during the course. As a trainer, you are in a unique position to help learners decide which skills they need more practice with and how best to structure their practice after the course. If a learner's preliminary plan was not a formal written plan, you can provide an action plan format that will help the learner formalize a plan. See pages 10 and 11 for information about action plans.

Conduct training evaluations

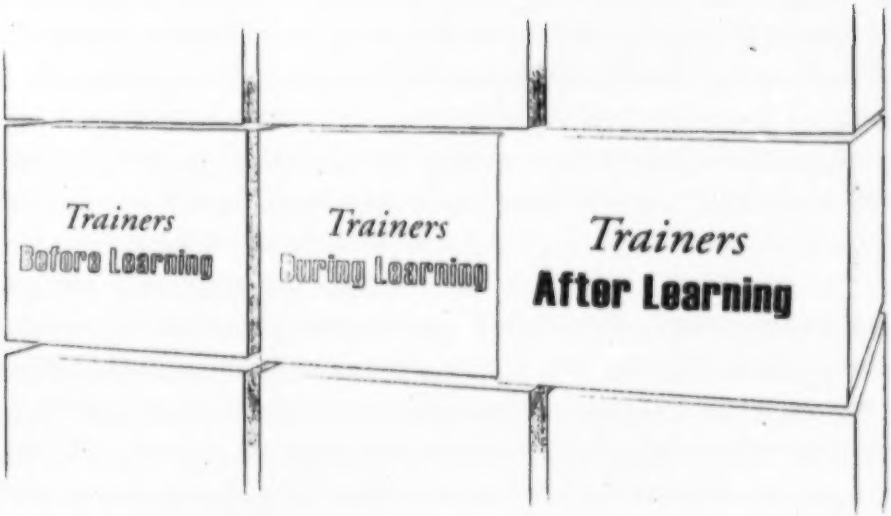
Each training course should have an evaluation component. During a course you may administer several types of evaluations including:

- ❑ pre-course knowledge and skills assessments to determine whether learners have the prerequisite knowledge and skills
- ❑ interim knowledge and skills assessments to measure learners' progress
- ❑ post-course knowledge and skills assessments to determine whether learners have achieved the course objectives and are performing to course standards
- ❑ course evaluations to give learners an opportunity to provide feedback on how well the course was conducted, whether the course materials were appropriate, and how well the course content met their performance needs.

Skills assessments or evaluations are typically based on performing a skill to a standard as detailed in a performance checklist. After training, these checklists can be used on the job in a number of different ways. For example:

- ❑ learners can use them as a job aid when applying the skill
- ❑ supervisors can use them to coach learners as they practice a new skill
- ❑ trainers can use them during follow-up visits to observe and provide feedback to learners.

When used over time, checklists can be helpful in tracking changes in performance from one observation point to the next.



Trainers — After Learning

Conduct follow-up activities in a timely manner

It is important for trainers to follow up with learners and supervisors to make sure new skills have become part of the routine back on the job or to determine why learners are having trouble applying new skills, if this is the case. This follow-up may include visits to observe, coach, solve problems, gather data (e.g., measuring learner progress and post-course outcomes) and identify other possible gaps in performance.

Help strengthen supervisors' skills

Transferring the responsibility for supporting learners to their supervisors is a key duty of trainers. During follow-up visits, discuss the supervision tools (i.e., performance checklists) developed for the training and how these can best be used. Conduct practice sessions with learners and supervisors, if appropriate, and be open to discussing other performance support and supervision issues. Helping supervisors understand their important role in the transfer of learning process will increase the likelihood of learner success.

Facilitate review of action plans with supervisors and learners

To be effective, an action plan has to be more than a piece of paper. When you review action plans with supervisors and learners, you can help them make sure the activities are described in specific detail and are consistent with the needs of the work environment. You may be able to suggest ways to make better use of time, develop more creative means for identifying and acquiring resources, or find ways in which learners and supervisors can work together to reinforce the learning.

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Staying in touch when funds for maintaining communication are not included in the budget—a few ideas:

- ❑ Have the learners deliver a questionnaire to their supervisors soliciting input on how the training has improved performance. Include a section that provides an opportunity for suggestions on improving the training based on the performance outcomes that supervisors are observing.
- ❑ Have trainers provide a job aid for supervisors that offers guidance about how to support the learners' new skills and how to contact the trainer if they have specific questions.
- ❑ Use regional, district, or other scheduled meetings to connect with the supervisors after the training intervention.
- ❑ Explain to program planners and other decision-makers the importance of providing funds or opportunities to communicate with supervisors and learners.

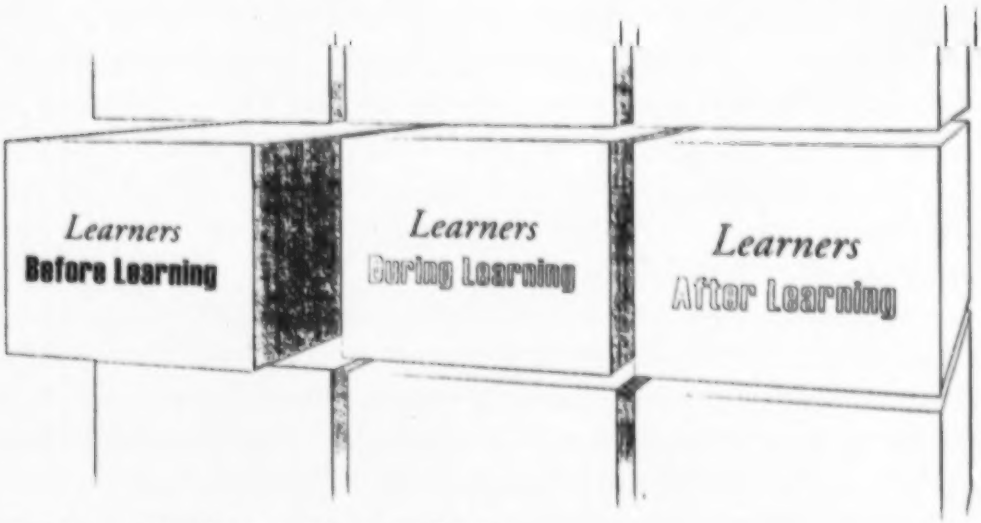
Share observations with supervisors and learners

Be tactful but candid in letting learners and supervisors know what you believe needs improvement. You may want to verify your observations with co-workers at the site, but be careful about sharing information on skill deficits. Often people will identify skill deficits themselves if provided an opportunity.

Your observations should be aimed at improving performance and maintaining your relationships with the learners and their supervisors. Remember to share the positive things you observe and constructively guide any need for improvement.

Maintain communication with supervisors and learners

Staying in touch with supervisors and learners will help them maintain their commitment to working on new skills together. You can help them find solutions to small problems before they become big problems. Staying in touch will also provide you with ideas that will help you adjust future courses and improve other elements within the training system.



Learners – Before Learning

Participate in needs assessments and planning

You can make training more beneficial and relevant to you and your organization by proactively identifying your learning needs, participating in needs assessments and helping to plan for the training and learning activities. By yourself or together with your supervisor and co-workers, consider what new or upgraded skills you need in order to improve the quality of services at your facility. Ask your supervisor what learning activities or other types of interventions are available to address these needs.

Sometimes we don't know what we need, especially in areas such as communication, leadership, supervision, and management. These needs can be identified through various types of needs assessments. If your supervisor is conducting a performance needs assessment, or if trainers are on-site collecting information related to a training intervention, communicate what you think are the existing problems at your work site. Offer your suggestions for what skills and training approaches might suit your needs. You can do this by completing questionnaires, participating in discussions with co-workers, volunteering to have your performance observed and assessed, or even offering to help field-test or review new training courses.

Once you have been selected for participation in a learning intervention, there are several important things you can do to prepare for transferring the new knowledge and skills you will learn back to your job. These activities are described below.

Review course objectives and expectations and prepare preliminary action plans

Review the course objectives and expectations and then talk with your supervisor about them. Clarify the ways in which the training objectives are related to your job and how the learning opportunity will improve your work potential, your skills and the services you provide. Discuss your expectations and those of your supervisor. Determine how you will practice and apply your new skills during and after training. Ask what support you will receive from your supervisor.

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Compile a list of the agreements you make with your supervisor. These may include:

- ❑ you will complete pre-course learning activities
- ❑ you will participate fully in the entire training program (no interruptions allowed)
- ❑ you will orient co-workers to the new knowledge and skills that will be applied after training
- ❑ your supervisor will provide opportunities for practicing and strengthening new skills after training
- ❑ your supervisor and co-workers will actively support your efforts to implement improvements.

This discussion with your supervisor, and a later discussion with co-workers, can help you begin your preliminary action plan by identifying your tentative goals and activities. See the sample action plan on page 11 for more information.

Begin establishing a support network

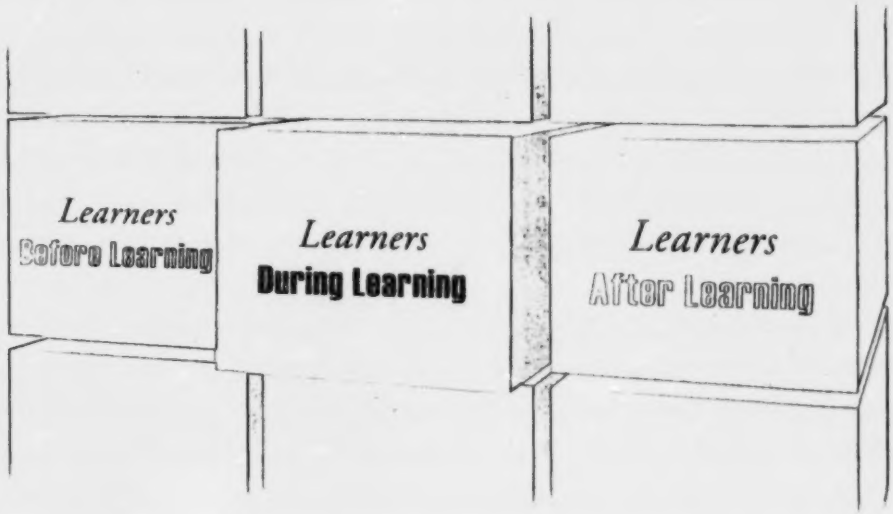
Even before the training starts, you can begin to prepare a support network that will help you to apply your new skills. Tell your co-workers about your upcoming training and let them know that you will share key learning points and resources with them afterwards. You may want to schedule a debriefing session to occur soon after the training course so that you can share with them your final action plan and solicit ideas for implementing what you have learned.

Some learning approaches may allow you to practice new skills with co-workers while you are learning. For example, on-the-job learning, self-directed learning and group-based learning that take place over several sessions or modules often include skill practice or assignments that learners must complete between the sessions.

If one or more co-workers are participating in the same training course, you can complete pre-course learning activities together, then share with each other what you hope to gain from the training and how you want to work together to apply your new skills. Talking with your co-workers will help you develop a commitment to support each other to improve your skills and the quality of health care services that you provide.

Complete pre-course learning activities

Prepare yourself to get the most out of the training by completing any required pre-course activities or learning tasks. In addition to the course description and objectives, the trainer may send you some background reading, a self-assessment questionnaire, and case examples or problems to analyze. Some courses require learners to successfully complete a self-directed learning module before they are eligible to start the course. The pre-course activities might also include gathering information or case examples from your own experience or work site to bring for use in training activities. Completing pre-course activities helps to ensure that you are prepared to learn and apply the new content in the course and also provides information that trainers need to make the course more relevant to your experience and working environment.



Learners – During Learning

Participate actively in the course
The more actively you participate in course sessions, exercises and other interactions with trainers and fellow learners, the more knowledge you will acquire. Active participation allows you to draw from the experiences of others, clarify content, practice skills, and explore how you will apply the new skills in your job. Active participation includes:

- ❑ being on time for and actively engaged in all learning sessions including discussions, problem-solving exercises, team projects, and skill practice sessions
- ❑ asking questions about the course content as it relates to your specific job
- ❑ trying out new behaviors where appropriate during the course, and requesting feedback to improve your skills
- ❑ sharing your ideas and requesting feedback from trainers and other learners
- ❑ discussing challenges and questions individually with trainers when possible (e.g., after class, during breaks, in between sessions, during site visits).

Additional mechanisms that can promote your active involvement in the course include:

- ❑ ***Identifying one or more learners (buddies) with whom you can complete assignments, share ideas, and discuss what you are learning.*** It's helpful to exchange ideas about how new skills can best be used in your job and to practice the skills that are applicable. A "buddy" relationship is most effective between co-workers or others with whom you can make a commitment to have an ongoing connection that will permit you to support each other after the training event. Linking with a learning buddy who is your co-worker allows you to identify important performance goals as a team and create a joint action plan for application at your work site, including details on how your plan will be shared with your supervisor and other co-workers. Other post-training support may come from professional associations and formal peer associations.

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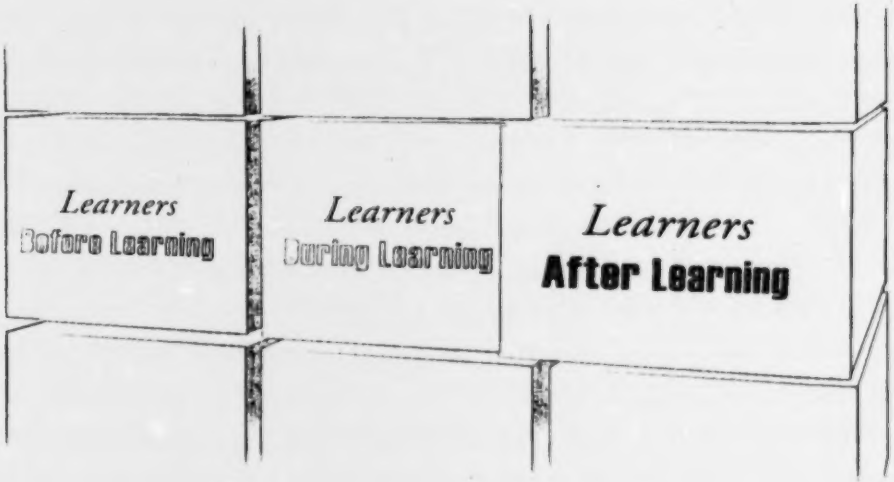
- ❑ ***Writing reflections about what you are learning.*** Making notes in a learning journal can help you retain knowledge and skills, share the most relevant information from training with your supervisor, and focus on the best ways to implement new practices at work. Your trainer may give you opportunities to write in your learning journal during the training sessions. In your journal, you can also keep track of problems and questions that you want to pursue with the trainer or other learners and make notes about the support and resources you think you will need to put new skills into practice. If you add to your journal throughout the training program, you can use it as a reference when you complete and implement your action plan.

Develop realistic action plans for transferring learning

The preliminary action plan developed with your supervisor—or the discussions that you and your supervisor had regarding expectations for the training—provide the foundation for your action plan. If your preliminary action plan was not a formal document, ask your trainer to provide you with guidelines and a format for developing a written action plan or refer to the sample plan on page 11. Refer to your learning journal and use what you have learned from your participation in the course as a basis for refining your action plan. Most action plans incorporate areas for improvement (describing measurable and achievable goals and objectives), anticipated problems or barriers you will overcome, and specific actions to be taken. For each action, identify the person responsible, any resources needed, a target date for completion, and changes you expect to occur as a result of the action. Some of the actions may highlight additional skills practice or self-development activities to help you reach your goal.

As you prepare to implement your action plan, consider using the following techniques:

- ❑ If feasible, make plans to have a trainer visit your work site or be available to consult with you and your supervisor after training to help facilitate implementation of your action plan.
- ❑ Try to anticipate potential areas of resistance (e.g., from supervisors, co-workers or administrative staff) or barriers at your work site (e.g., logistical or supply and equipment problems).
- ❑ With your trainer or a learning buddy, brainstorm about how these barriers can be overcome and determine what resources and types of support are needed to surmount the obstacles.
- ❑ Include the steps identified for overcoming barriers in your action plan.



Learners – After Learning

Meet with supervisor to review action plan

The meeting with your supervisor that you planned together before training is one of the most effective ways to initiate support for transfer of learning. Meet with your supervisor as soon as possible after the training ends. Review the goals and objectives and mutual expectations for improvement that you discussed prior to training. Go over each activity in your action plan, the resources and support needed, target completion dates, and expected changes. Brainstorm about how your trainer and supervisor can work together to support the transfer of your new skills to the job. Make adjustments to your action plan and establish times for regular progress reviews with your supervisor.

Apply new skills and implement action plan

After discussing your action plan with your supervisor, share it with your co-workers, especially those you have identified to help implement action plan activities. Explain to them that you will be practicing new skills and carrying out special activities as your action plan is implemented. Orient them to any new procedures you will be using and share any materials that might interest them. (Note: Unless you have been trained to train others, you should not be expected to train your co-workers, especially in complex clinical procedures.) Explain the activities that will involve your co-workers and ask them to provide the feedback that you need. It is best to have your supervisor present during debriefing sessions with your co-workers to reinforce and show support for your activities.

Post your action plan on the wall or other prominent place and check off activities when you complete them. Be sure to set aside time to review the training content and practice new

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skills using any job aids provided during training (e.g., flow charts and checklists). If other co-workers participated in training and you developed a joint action plan, carry out the activities according to the action plan assignments. Meet periodically for progress reviews with each other and with your supervisor.

Meet regularly with your supervisor (and with your trainer if a training follow-up visit is scheduled) to discuss progress and any constraints to transferring your learning. Work with your supervisor to identify any additional support and resources needed to implement the new skills. Many steps are often necessary to ensure transfer of learning occurs—carefully identify these actions and then follow each one. Implementing your action plan and applying your new skills is a team effort that can only succeed with the cooperation and support of everyone in your organization.

Use job aids

Training courses often provide learners with job aids that are used as memory cues for how and when to perform a task. Sometimes learners will develop job aids as part of their training course. Use these job aids frequently and, if appropriate, share them with your co-workers. They can help you remember what you learned and incorporate your new knowledge and skills into your job tasks.

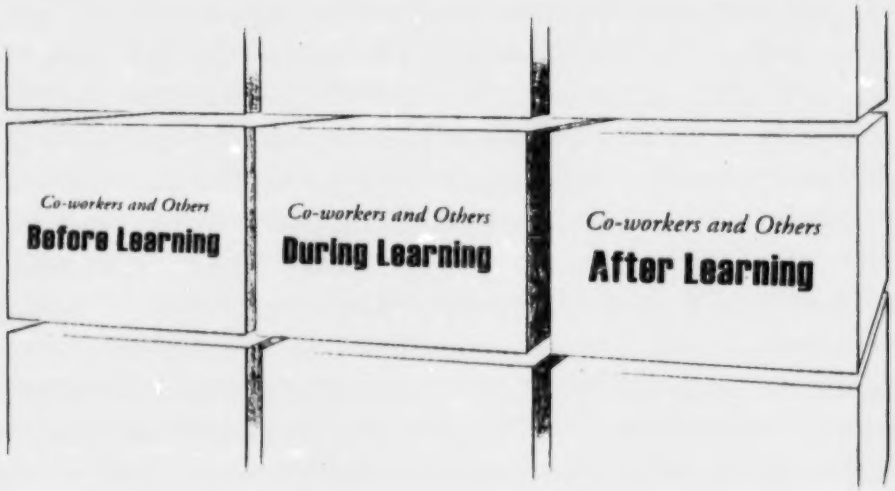
Network with other learners and trainers for support

A support network of learners or a learning buddy can increase the likelihood of transferring learning after training—if there is a commitment to maintaining these relationships. Find ways to continue your contact with other learners through regular meetings, telephone conversations, and visits. You can share experiences in implementing action plans, discuss problems encountered and lessons learned, celebrate successes, and help each other set new goals or revise action plans.

When trainers contact you for follow-up, use that opportunity to share successes and problems and receive feedback. In post-training surveys or interviews, give concrete and constructive feedback to the trainer on how the program could be improved. Also mention additional skills training and support that you think would help improve your performance and the quality of health care services that you provide.

Monitor your own performance

Conduct regular progress checks to help ensure continued transfer of learning. You can monitor your own performance by setting aside time to review your action plan and the feedback or observation data from your supervisor, trainer, and other learners and co-workers. Consider keeping a chart of your scores on skills evaluations. If possible, also chart the health service statistics related to your action plan, such as new services or changes in services. Continue to maintain a learning journal to keep track of your experiences, the questions you have and barriers you face in applying knowledge and performing skills. Share these notes on a regular basis with your supervisor and seek help in reviewing and updating your action plan.



Co-workers and Others – Before Learning

Participate in needs assessments and discussions of the training's intended impact

You and your co-workers can make important contributions to the performance improvement and training process even though you may not attend the training event. Try using some of the procedures described below to help learners transfer new knowledge and skills to your work site.

- ❑ Participate in the needs assessments: help gather information, give honest feedback about individual and work site needs as you perceive them and discuss findings with your co-workers and your supervisor.
- ❑ Participate in discussions with your supervisor and co-workers about how the training is supposed to improve services. Be aware of these training goals and the action plans of the learners so that you can be supportive.

Share your thoughts and ideas with others. Training interventions require a supportive, helpful work place in order to be successful.

Ask learners to bring back key learning points to share with the work group

You and other staff at the work site can benefit from the learning experiences of your co-worker(s). In the days prior to the learning event, make a point of talking with learners to encourage them and let them know that you share their excitement and are interested in what they will be learning. Also let them know that you look forward to helping them transfer what they have learned when they return to work. If you have specific interest or expertise in the content area, you may want to give them a list of questions that you would like them to discuss with the trainer or ask them to bring back resource materials to share.

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During Learning

Complete learners' reassigned work duties

When co-workers leave for training it is often hard to continue to provide good services. You can help by taking on some extra duties while they are in training. This may mean working harder for a week or so. Your supervisor may assign extra duties for you. One way to be supportive is to ask your supervisor if there is anything you can do to help while your co-worker is in training.

Participate in learning exercises at the request of learners

Some training designs and approaches require learners to practice new knowledge and skills on the job during the course of the learning event. Group-based training that takes place over several different sessions often includes assignments that learners must complete between the sessions. On-the-job and self-directed learning approaches generally incorporate opportunities for learners to practice new skills while they are still learning. At the request of learners or your supervisor, you may be able to assist with the learning exercises by observing learners or helping them practice skills by participating in role-plays.

After Learning

Be supportive of learners' accomplishments

Soon after the learning event, ask the learners what they have learned that is most helpful; ask them about ways to apply knowledge and skills at your site, and assure them that you will help them with the transfer of learning. Although the initial conversation might be just a friendly chat, make sure that you set aside time to talk about their learning experience in more detail. In most cases, especially when complex clinical procedures are involved, learners will not have the skills to actually teach you what they have learned. However, they will be able to share basic principles with you that will allow you to support their learning efforts. Try using some of the following suggestions to support the transfer of learning:

- ❑ Ask learners to share copies of learning materials, then review the materials to update your own understanding of the topic. Discuss with the learners things that you find interesting in the materials and ideas they have shared.
- ❑ If the site supervisor has agreed that new standards or procedures are to be adopted (e.g., stricter infection prevention practices), ask the supervisor how you can assist in their application. Although you will need training to upgrade your own knowledge and skills, learners can provide you with an initial orientation to the new practices.
- ❑ If the learners acquired a new skill, watch them demonstrate the skill or offer to participate in role plays with them so that they can continue to practice what they have learned. Find ways to encourage them to apply their new skills.

People are influenced by those around them—you can help your co-workers apply their new knowledge and skills so that everyone can benefit.

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ACTION PLAN

Learner: Training Intervention: Date:

My Support Team/Network Co-worker(s): Supervisor: Trainer:

Specific Areas to Improve: (Think about distinct accomplishments and activities to be achieved.)

Problems to Overcome: (Describe the barriers that must be eliminated or reduced and how this will be done.)

Detailed Specific Actions in Sequence (Include regular progress reviews with the support team as a part of the specific actions)	Responsible person(s)	Resources	Date/ Time*	Changes To Look For
Step 1.				
Step 2.				
Step 3.				
Step 4.				
Step 5.				
Step 6.				
Step 7.				
Step 8.				
Step 9.				
Step 10.				
Step 11.				

Commitment of Support Team/Network:

Signature of learner: Date:
Signature of supervisor: Signature of trainer:
Signatures of co-workers:

* establish set day and time for ongoing activities

PRIME II

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Working in more than 20 countries, the PRIME II Project is designed to strengthen the performance of primary care providers of family planning and reproductive health care as they strive to improve services in their communities. PRIME II is implemented by Intrah in conjunction with project partners Abt Associates, EngenderHealth, Program for Appropriate Technology in Health (PATH), and Training Resources Group, and supporting institutions, the American College of Nurse-Midwives and Save the Children.

Intrah

Intrah is a global health development assistance organization based in the School of Medicine at the University of North Carolina at Chapel Hill. Established in 1979, Intrah focuses on providers of client-centered, primary-level health care in low-resource settings, and is an established leader in the creation of training systems. A PAHO/WHO Collaborating Center for the Development of Human Resources in Health, Intrah also assists in building institutional capacity and developing and implementing service delivery policies and standards. Regional offices are located in the Dominican Republic, India, Kenya and Senegal.

The PRIME II Project

Intrah

School of Medicine

The University of North Carolina at Chapel Hill

1700 Airport Road, Suite 300 CB 8100

Chapel Hill, NC 27599-8100

Tel: 919-966-5636

Fax: 919-966-6816

intrah@intrah.org www.prime2.org

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Through advocacy, education and performance improvement, JHPIEGO helps host-country policymakers, educators and trainers increase access and reduce barriers to quality health services, especially family planning and maternal and neonatal care, for all members of their society. JHPIEGO's work is carried out in an environment that recognizes individual contributions and encourages innovative and practical solutions to meet identified needs in low-resource settings throughout Africa, Asia and Latin America and the Caribbean. Established in 1973, the JHPIEGO Corporation is a nonprofit organization affiliated with Johns Hopkins University.

JHPIEGO

1615 Thames Street, Suite 200

Baltimore, MD 21231

Tel: 410-955-8558

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